

Customer Service Managers:

Are Your Team's Cubicle Walls Covered with Cheat Sheets and Sticky Notes?

**When was the last time someone updated
your team's bulky desk references?**

**(You know...those 6-inch-thick binders that sit on each
of your operator's desks?)**

You're a customer service manager or head of the underwriting department of a rapidly expanding insurance company. You manage a team of well-trained customer service reps who are dynamite on the phone. But they're not resolving customer calls. There are

- long hold times
- too many hang-ups
- too many lost sales

bulky hardcopy desk reference

Your CSRs are spending too much time looking up answers to customers' questions, and the information they finally find is

- out of date
- incomplete
- or flat out wrong

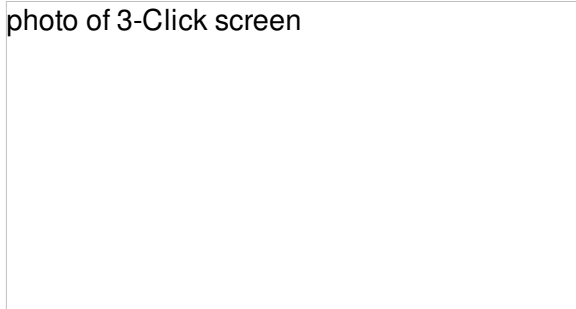
You need to give them a better tool--and fast!

They need Accurate, up-to-date information
that is Easy to access
that can Quickly and successfully resolve your customer's
call

Introducing the 3-Click Online Desk Reference

A custom-built, browser-based information system

photo of 3-Click screen



- Replaces your bulky, out-of-date hardcopy desk reference
- Allows you to decide what information to include
- Provides quick and easy access--in 3 clicks or less!
- Runs in Internet Explorer or other browser--no additional software needed
- Makes updating easy and fast--you can do it yourself!

Wow, we didn't know it would have so much information in it! Before we purchased this system, we thought we needed a searchable database. This is so much simpler. Don't get me wrong—it's great that we can search our new desk reference, but really, we don't need to. All of the information is so easy to find. They really were serious when they named it the "3-Click Desk Reference."

—Carri Kerr, Team Leader, Rider Service

Never let your customers hear these dreaded words: "Can I Put You on Hold for a Moment?"

Dead air is a call center's worst enemy. A customer on hold is a cranky customer.

- Don't make your CSR park your customer on hold.
- Don't make your CSR thumb through an outdated, error-ridden desk reference.
- Don't make your CSR leave her desk to go ask a team leader for an answer.

That caller may be gone by the time the CSR gets the info she needs.

You need to service your customers quickly and accurately. As a manager, you know the best way to do this is to give your team the tools they need to get their job done.

Empower your CSRs by giving them access to accurate information—just 3 clicks away

Your operators need to be able to respond to customer questions...

- Contact numbers
- Rates
- Coverage information
- Thousands of bits of data and information

They can't be expected to remember all of this stuff! You taught them to exhaust their resources before they ask someone else for help. Give them the resource they need! Let your CSRs deliver excellent customer service--let the 3-Click Desk Reference deliver the information!

- Reduces call center costs
- Increases customer satisfaction
- Gives underwriters more time to make sales
- Saves money--no costly programming or database administration
- Eliminates training costs because it's so easy to use

Perhaps your situation is similar to Theresa Greer's. Here's her story:



Case Study: Theresa Greer manages the call center for the insurance division of the largest American-made motorcycle manufacturer in the U.S. (yup, you know the one, but they don't allow their name to be used in other companies' ads—think “hog”). One day, Theresa was looking out her office door and saw a string of people lined up at one of her team leader's cubicles. “Who's answering the phones?” she wondered in alarm. “Why aren't these people at their desks serving our customers?” Theresa knew she had a problem.

After meeting with her team leaders, Theresa learned that operators were putting customers on hold while they left their desks to go ask their team lead for answers to customers' questions. Theresa instructed her team leaders to document what kind of questions the operators were asking. Were the questions personnel issues? Was it primarily new hires who didn't know any better? Was she not adequately training her people?

It turned out that 75% of the questions asked were about information that operators couldn't find—or couldn't understand—in their hardcopy desk reference. Theresa wisely determined that she needed to empower her people by giving them quick and easy access to the information they needed. She had already tried putting the information online, but it was badly organized and rarely updated. Her people regarded the online desk reference as part of their problem—not part of their solution.

Theresa called me—a technical writing consultant—hoping to learn what options might be available. I introduced her to the 3-Click Desk Reference. Her company brought me onsite for two days to meet with team leaders, IT staff, and dozens of operators, and we designed—right there in her conference room—the customized version of the 3-Click Desk Reference. She involved as many people as possible in the project—not only to share the load of gathering and transferring information to me, but to create tremendous buy-in for the project. This was their project—their solution—and ultimately their success.

The rest is history, as they say. I built their customized 3-Click Desk Reference; they tested it all along the development cycle and discovered lots more information that should be in it. They were involved and they affected the direction and even the value of the project. Although Theresa had planned to assign one employee responsibility for updating the information (no expensive training necessary--it's simple HTML), she discovered that she could save even more money by sending her updates to me to do. I turn them around within 24 hours. Theresa immediately began to see the difference the 3-Click Desk Reference was making in her

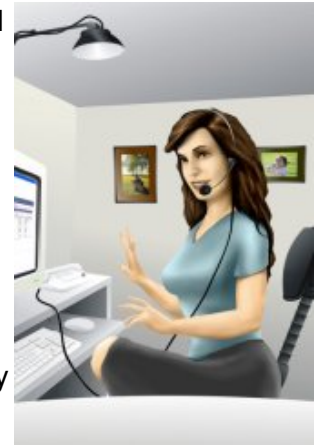
department.

[Click to hear Theresa describe what the 3-Click Desk Reference has done for her department.](#)

The first truly easy online desk reference for customer service representatives

The 3-Click Desk Reference is a collection of browser-based files written in simple HTML—the language of the Internet. But the easy navigation is something you've never seen before!

- Runs on Internet Explorer, Netscape, or any other browser
- Runs on any operating system
- Organizes information so that a user can find it in 3 mouse clicks or less.
- Provides users with both a TOC and an Index to quickly locate information.
- Contains a glossary for quick look-up of unfamiliar terms or abbreviations.
- Allows users to search the entire desk reference by keywords and “natural language” queries.



And best of all...

No Training Necessary!

- If your team uses Outlook or Internet Explorer, they will already know how to use the 3-Click Desk Reference.

You decide what goes into your 3-Click Desk Reference

It doesn't matter if you are an insurance agency or an insurance carrier. It doesn't matter what kind of insurance you sell—Auto • Health • Motorcycle • Home • Marine

The 3-Click Desk Reference is custom-built to suit your company's business. You choose the information that your CSRs need and I build it into your online desk reference.

- | | |
|---|-------------------------------------|
| • Coverage information | • Forms |
| • Underwriting guidelines | • Process flows |
| • Procedures | • Scripts |
| • Authorized contacts | • Benefit information |
| • Cancellation information | • Frequently called numbers |
| • State-specific information for each carrier or insurance plan | • Plan comparisons |
| | • Carrier comparisons |
| | • Anything else your operators need |

You choose the information to include!

It's only fair to tell you what the 3-Click Desk Reference IS NOT:

- It's not a complicated content management system
- It's not an expensive database
- It's not a customer relationship management application
- It's not telephony phone software (matter of fact, it's not software at all)
- It doesn't require any expensive software or hardware to run—just a browser and either a shared harddrive or intranet server.



Case Study: Foundation Health Plans was rapidly expanding its HMO line of healthcare plans. Its Philadelphia region alone was responsible for managing 7 different carriers across 18 U.S. states. Each of the 20 call center nurses had a huge, outdated desk reference parked alongside her computer monitor. Her phone connected her to over 100 people a day calling about their health problems. Her telephony software displayed the scripts necessary to manage their medical triage, but nothing else.

She needed to quickly access information from many carriers doing business in many states—her patients' health depended on her ability to provide a quick response. Where was the nearest ER? Would my insurance carrier cover this service? How can I contact my case manager? Was there a health plan nurse on call? How do I arrange for ambulance transportation?

How can one customer service rep be expected to remember all that information?

Foundation Health Plans contacted me to develop their custom 3-Click Desk Reference. I had just completed a hardcopy manual and online Help system for a medical management software application developed by one of FHP's subsidiaries (both publications received international awards). FHP dedicated one of their administrative assistants to collect, verify, and relay to me the information they wanted to include in the desk reference. It was a tremendous success. According to RaeAnn Vandeputte, FHP's project manager,

"Management wasn't excited about our initial proposal to purchase the new online desk reference. But as soon as we showed them statistics identifying our hold times along with staff's frustration with finding information in our cumbersome set of three 3" binders, they immediately saw the financial and customer-focused benefits. After implementing our 3-Click Desk Reference, our calls were completed nearly 15% faster, but most importantly the nurses enjoyed the autonomy of answering questions without management help, and customers received what they needed in a timely manner. In the medical field, time is of essence, and the 3-Click system gave us that extra edge."

Avoid embarrassing and costly callbacks—give your customers accurate information the first time

My clients tell me that one of the most frustrating—and expensive—problems their customer service reps experience is learning after the fact that the information they gave to a customer was the wrong information. Those bulky hardcopy desk

references are hard to keep current, and when information changes quickly, operators may not even know a change occurred.

Did your CSR write a policy today without knowing that the underwriting rules changed yesterday?

That has to be embarrassing—calling the customer back to explain why you didn't get it right the first time. Did it cost you money? Did it cost you goodwill? Did it cost you the client? How much DOES it cost your company every time an operator struggles to find information or uses wrong information?

The 3-Click Desk Reference is an affordable solution to your information headaches.

A call center is a cost center. To offset that cost, your operators must

- answer as many calls as possible in a shift
- eliminate anything that unnecessarily lengthens the time they spend with a caller
- avoid putting a caller on hold
- avoid having to leave their desk to get help from their supervisor

Underwriting is a profit center. To ensure a sale, your sales reps must

- quickly answer prospective clients' questions
- be knowledgeable about all of the available plans and how they compare
- be aware of scheduled rate changes
- know which carriers do business in your caller's state

Call center CSRs and underwriting sales reps will maximize their performance when using the 3-Click Desk Reference, saving you money and generating more revenue. Add up the call center costs and underwriting's lost sales, multiply it by the number of shifts times 365 days a year, and you'll be surprised at how much an inefficient information system can cost you.

Example:

$$3 \text{ extra minutes per call} \times 50 \text{ calls a day} \times 250 \text{ days/year} \times \$12/\text{hour} = \\ \$7500/\text{year of lost revenue for just one operator!}$$

How many operators do you have in your call center and underwriting departments? How much is it costing you when your operators can't quickly access necessary information? The 3-Click Desk Reference will quickly pay for itself—the more operators that use it, the quicker the payoff.

You can't afford NOT to give them this tool!

When we purchased the 3-Click Desk Reference, it was really an investment in our employees. They're great people and really good at their jobs. Their self-confidence really sparkles on the phone when they know that management is supporting them with good tools. That makes our customers really happy, too!

—David Mackie, Insurance Team Leader

I'm not going to mislead you...

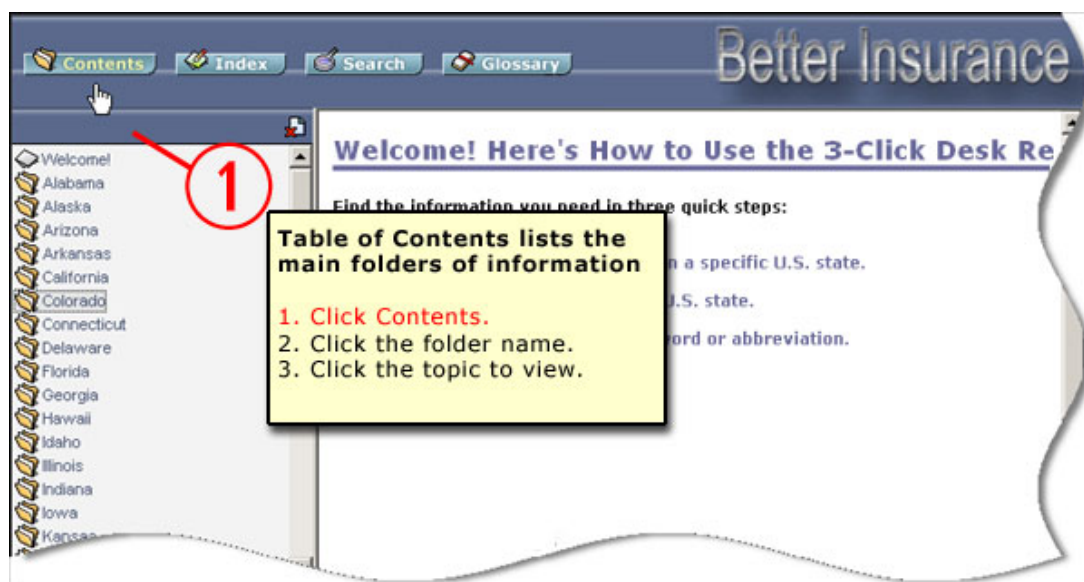
“affordable” does not necessarily mean “cheap”

How much your system ultimately will cost depends on several things:

- How many carriers or plans you use
- How many states you do business in
- How much information you want to include
- How you choose to relay information to me
- Whether you choose to maintain it in-house or contract with me to maintain it

You will be surprised at how quickly you will achieve your [return on investment \(ROI\)](#), making your purchase of the 3-Click system a sound investment with a quick payback.

Here’s a quick peek at what your 3-Click Desk Reference might look like...



...but I’d really like to give you a no-cost, personal tour

No matter how much I try to tell you about the 3-Click Desk Reference on this page, I’m sure you have a lot more questions to ask. Will it work in my situation? How long will it take? What kind of operating system does it run on? What will I need to do?

I can very quickly show you a working system, put it through its paces, and answer any questions you have. All you need to do is **CONTACT ME!** To request an immediate demo, call me or email me for login information:



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friend



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